Insert Project Title

Identify if this is a Phase I or Advisory Down Select Briefing in the title

Presentation of SSEB Findings to the Source Selection Authority {Insert Date}

Presented by:
Insert Name & Title
Insert Name, Contracting Officer

Source Selection Information See FAR 2.101 & 3.104

Source Selection Information

The information contained in this briefing is **Source Selection Information**. It **may not** be disclosed to anyone not a member of the established source selection organization without the expressed approval of the **Source Selection Authority** or the **Contracting Officer**!

Identification & Background Information

Select which type of evaluation is being perfor

PROJECT DESCRIPTION:
{Insert Project Description}

PHASE I: Submission of qualifications. Down select to the approximately three (3) most highly qualified offerors.

PHASE II: Submission of design and technical solutions, management approach, past performance and pricing. Single, best value award.

SINGLE PHASE EVALUATION: Responses to the RFP were evaluated for award.

ADVISORY DOWN SELECT: Viable offerors identified after submission of initial proposal material prior to submission of subsequent proposal material.

CONTRACT TYPE: Fixed Price Incentive (Firm Target) with award fee provisions

PERIOD OF PERFORMANCE: {Insert period of performance}

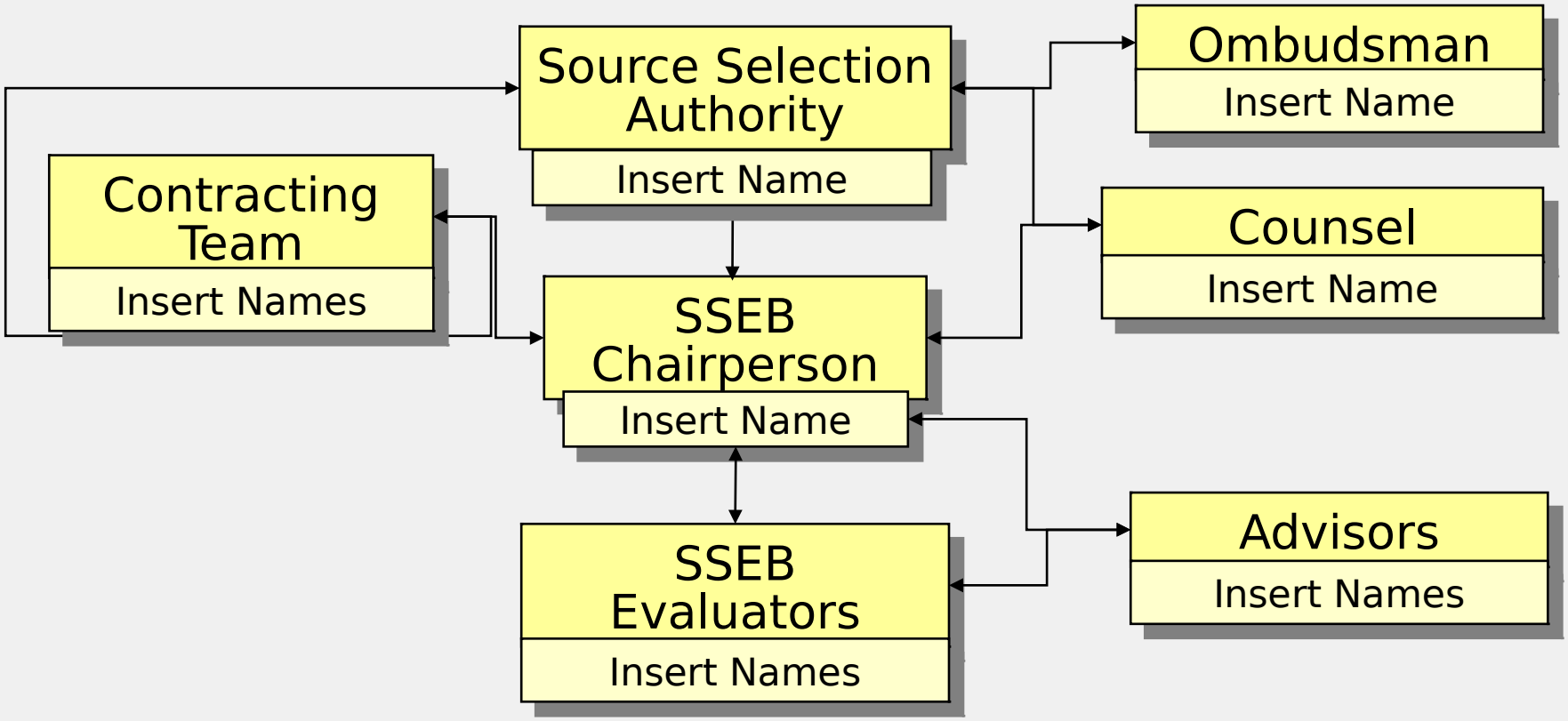
Source Selection Information See FAR 2.101 & 3.104

Procurement Schedule

RFQ/RFP Issued	{Insert Date}
Proposals Received	{Insert Date}
Begin Evaluation	{Insert Date}
Oral Presentations	{Insert Dates}
SSA Brief	{Insert Date}
Down Select Decision	{Insert Date}

Source Selection Information See FAR 2.101 & 3.104

Source Selection Organization



Source Selection Information See FAR 2.101 & 3.104

Evaluation Factors

- Factor 1 – Past Performance
- Factor 2 – Factor Name
  - Sub-Factor 1 - {Insert Sub-factor Title}
  - Sub-Factor 2 - {Insert Sub-factor Title}
  - Sub-Factor 3 - {Insert Sub-factor Title}

Insert the factors and subfactor
used in the evaluation, and thei
Relative order of importance.

Order of Importance

F1>F2

F2SF1=F2SF2=F2SF3

Best Value

- The Government may select for award the offeror whose price is not necessarily the lowest, but whose technical proposal is more advantageous to the Government and warrants the additional cost.

Source Selection Information See FAR 2.101 & 3.104

Past Performance

Factor 1

Submission Requirements

- Project/Contract Master List
  - Recent projects/contracts over $**xx** million
  - Project descriptions
- Project/Contract Relevance Summaries
  - {**X**} most relevant projects/contracts
    - » Written - 1 page limit per project
  - Offeror initiated questionnaires

Evaluation Process

- Evaluated as a measure of the Government's confidence.
- Evaluation was not limited to the {**X**} relevant projects/contracts identified by each of the offerors.
- Evaluated based on the information received from:

- Performance Questionnaires
- Phone interviews
- Project descriptions
- Relevance summaries
- Other databases and sources

Source Selection Information See FAR 2.101 & 3.104

Past Performance

Factor 1

Evaluation Criteria

- Recency
  - On-going or completed in the last 2 years
- Relevance
  - Defined later in the briefing
- Performance Elements:

• Quality	• Schedule
• Performance	• Cost Control
• Meeting Technical Requirements	• Customer Satisfaction

Source Selection Information See FAR 2.101 & 3.104

Factor Title

Factor 2

- {Factor title} will be evaluated by the sub-factors listed below:
  - {Insert Sub-factor Title}
  - {Insert Sub-factor Title}
  - {Insert Sub-factor Title}

Source Selection Information See FAR 2.101 & 3.104

Factor Title

{Insert Sub-factor Title}(Sub-factor 1)

Submission Requirements

- {Insert submission requirement}
- {Insert submission requirement}
- {Insert submission requirement}

Evaluation Criteria

- {Insert evaluation criteria}
- {Insert evaluation criteria}
- {Insert evaluation criteria}

Source Selection Information See FAR 2.101 & 3.104

Factor Title

{Insert Sub-factor Title}(Sub-factor 2)

Submission Requirements

- {Insert submission requirement}
- {Insert submission requirement}
- {Insert submission requirement}

Evaluation Criteria

- {Insert evaluation criteria}
- {Insert evaluation criteria}
- {Insert evaluation criteria}

Source Selection Information See FAR 2.101 & 3.104

Factor Title

{Insert Sub-factor Title}(Sub-factor 3)

Submission Requirements

- {Insert submission requirement}
- {Insert submission requirement}
- {Insert submission requirement}

Evaluation Criteria

- {Insert evaluation criteria}
- {Insert evaluation criteria}
- {Insert evaluation criteria}

Source Selection Information See FAR 2.101 & 3.104

Definitions

- **Significant Strength (++)** - An outstanding or exceptional aspect of a proposal that appreciably increases the Government's confidence in the offeror's ability to successfully perform contract requirements.
- **Strength (+)** - A significant outstanding or exceptional aspect of a proposal that exceeds the minimum evaluation standard.
- **Weakness (-)** - A flaw in the proposal that decreases the Government's confidence in the offeror's ability to successfully perform the requirements of the contract.
- **Significant Weakness (--)** - A flaw that appreciably increases the chance of unsuccessful performance.
- **Deficiency (D)** - A material failure of a proposal to meet a Government requirement or a combination of significant weaknesses in a proposal that increases the risk of unsuccessful contract performance to an unacceptable level.

Merit Ratings

Factor Name

H Purple

Outstanding:

S Blue

Excellent:

C Green

Acceptable:

L Yellow

Marginal:

N Red

Unacceptable:

Insert the merit definitions appropriate for what is being evaluated.

Source Selection Information See FAR 2.101 & 3.104

Confidence Ratings

Factor Name

H Purple

High confidence:

S Blue

Significant confidence:

C Green

Confidence:

L Yellow

Little confidence:

N Red

No confidence:

Insert the confidence definitions appropriate for what is being evaluated.

Source Selection Information See FAR 2.101 & 3.104

Confidence Ratings

Past Performance

H
Purple

High confidence:

S
Blue

Significant confidence:

C
Green

Confidence:

?
Green

Unknown confidence: The Offeror has no relevant performance record. A thorough search was unable to identify any relevant past performance information (see FAR 15.305). This is a neutral rating. It does not hinder nor help the Offeror.

L
Yellow

Little confidence:

N
Red

No confidence:

Insert the past performance confidence definitions appropriate for what is being evaluated.

Source Selection Information See FAR 2.101 & 3.104

Evaluation Summary

	Offeror A	Offeror B	Offeror C	Offeror D	Offeror E	Offeror F
Factor 1 Past Performance	C	C	C	C	C	C
Factor 2 anagement Approach						
SF1 {Insert sub-factor Name}	C	C	C	C	C	C
SF2 {Insert sub-factor Name}	C	C	C	C	C	C
SF3 {Insert sub-factor Name}	C	C	C	C	C	C

This is an example of how to display ratings for an evaluation that only uses Confidence ratings.

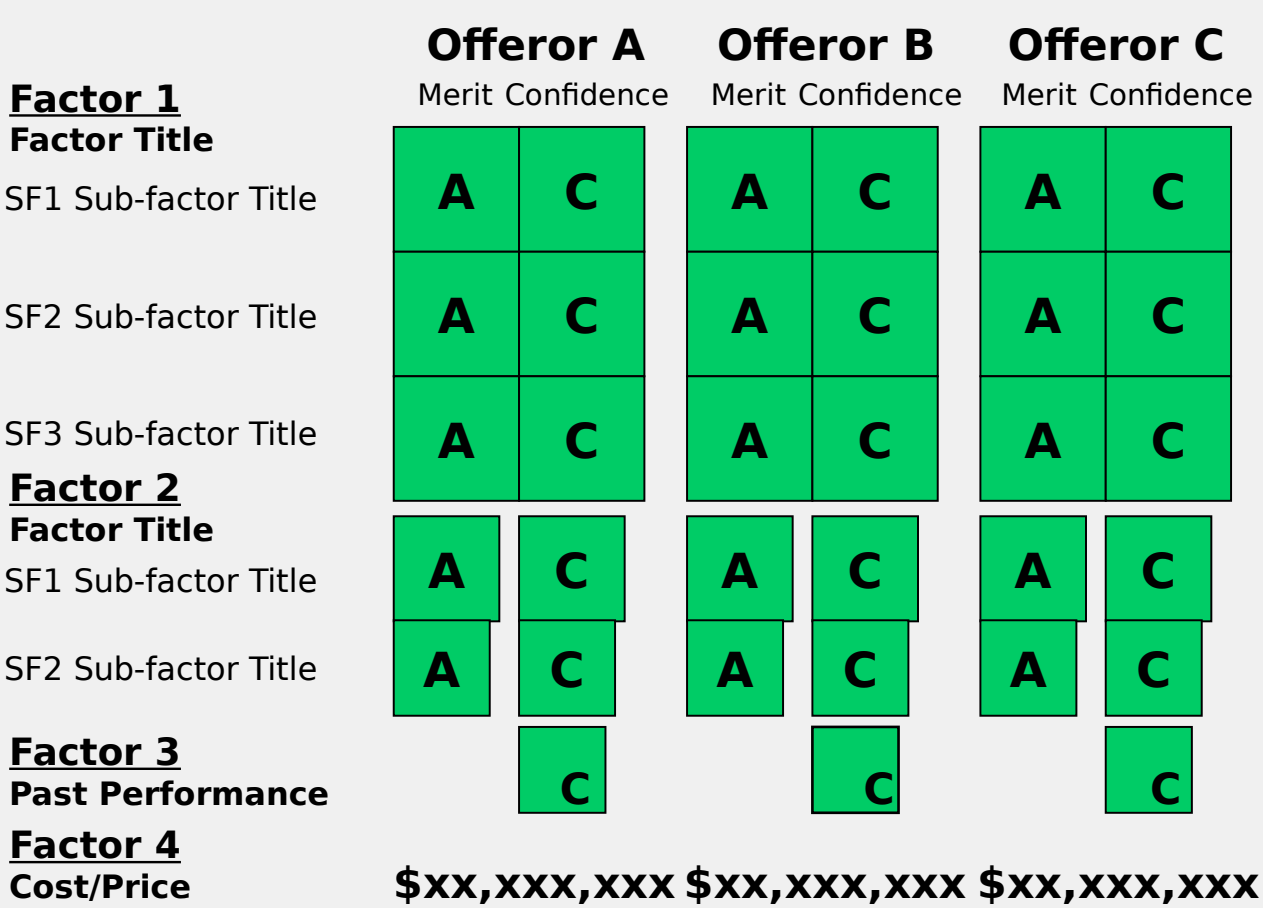
Confidence Ratings

H	High Confidence
S	Significant Confidence
C	Confidence
?	Unknown Confidence
L	Little Confidence
N	No Confidence

Factor 1> Factor 2
Factor 2: SF1=SF2=SF3

Source Selection Information See FAR 2.101 & 3.104

Evaluation Summary



This is an example of how to display ratings for evaluations that use both merit & confidence rating

Merit Ratings

- O Outstanding
- E Excellent
- A Acceptable
- M Marginal
- U Unacceptable

Confidence Ratings

- H High Confidence
- S Significant Confidenc
- C Confidence
- ? Unknown Confidence
- L Little Confidence
- N No Confidence

If this is a FPR briefing, indicate the change In ratings with an up or down arrow.

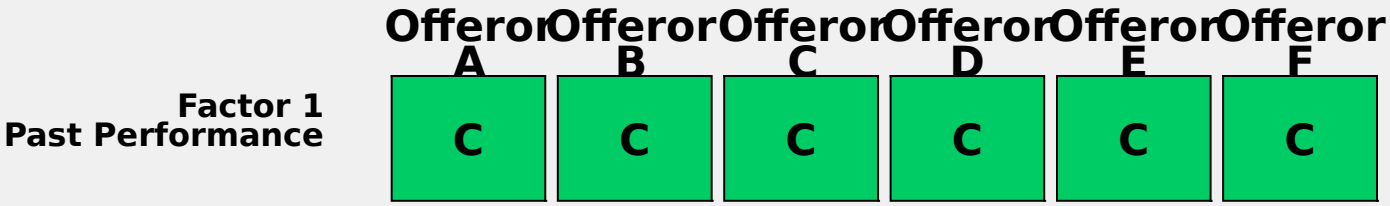
↑ ↓

Merit = Confidence
F1 > F2 > F3 > F4
Factor 1 - SF1 = SF2 = SF3
Factor 2 - SF1 > SF2

Source Selection Information See FAR 2.101 & 3.104

Past Performance - (Factor 1)

Evaluation Summary



This is an example of how to display ratings for an evaluation that only uses Confidence ratings.

Confidence Ratings

H	High Confidence
S	Significant Confidence
C	Confidence
?	Unknown Confidence
L	Little Confidence
N	No Confidence

Factor 1> Factor 2
Factor 2: SF1=SF2=SF3

Source Selection Information See FAR 2.101 & 3.104

Relevance Definitions

Projects involving renovation of {State project similarities or types}, > $XXM, on-going or completed in the last 5 years.

Relevance Aspects

1. List project relevance aspects

Highly Relevant: Define Highly Relevant
Relevant: Define Relevant
Not Relevant: Define Not Relevant
***Note**:* Projects performed by business divisions other than the one proposing may be considered less relevant!

Source Selection Information See FAR 2.101 & 3.104

Reference Check Interviews

- Offeror A (XX)
  - Prime (GC)
    x
  - AE (a) x
  - AE (b) x
- Offeror B (XX)
  - Prime (GC)
    x
  - AE (a) x
  - AE (b) x
- Offeror C (XX)
  - Prime Partner 1 (GC)
    x
  - Prime Partner 2 (GC)
    x
  - AE x
- Offeror D (XX)
  - Prime (GC)
    x
  - AE x
- Offeror E (XX)
  - Prime (GC)
    x
  - AE x
- Offeror F (XX)
  - Prime (GC)
    x
  - MEP x
  - AE x

Total Phone Interviews - XX
+ Information from other sources

Past Performance

Offeror A

C

Insert Relevance chart for your project.
Use “Paste Special/Picture” when copying Chart from Excel. Rearrange slide as necessary To accommodate the chart, the Performance Summary, and the Confidence Rationale.

Performance Summary

The Offeror had Excellent performance on two Highly Relevant Projects and Outstanding performance on two Relevant projects. Two projects cited the Offeror for their excellent quality control program and for being very proactive. One project earned a Gold LEEDS rating when the design only called for Bronze. The Offeror demonstrated excellent cost control and value engineering on one project, ending up $800K under budget. The Offeror did a good job dealing with a large number of unknowns, differing site conditions discovered after construction started, and a client with a large number of requested changes. They were rated “9 out of 10” on one project and “10 out of 10” on another.

Confidence Rationale

We have High Confidence the Offeror will be able to successfully complete the requirements of this project. The excellent level of performance consistently demonstrated by the Offeror increased our confidence. Our confidence was also increased by the proposing GC and AE having worked together on a Highly Relevant design build project. We therefore have virtually no doubt that the Offeror will be able to successfully perform the required efforts with virtually no intervention by the Government.

O Outstanding
E Excellent
A Adequate
M Marginal
P Poor

Source Selection Information See FAR 2.101 & 3.104

Factor Title - (Factor 1, Subfactor 1)

{Subfactor Title} Summary

Factor 1
Factor Title

SF1 Sub-factor Title

Offeror A		Offeror B		Offeror C	
Merit	Confidence	Merit	Confidence	Merit	Confidence
A	C	A	C	A	C

This is an example of how to display ratings for evaluations that use both merit & confidence rating

Merit Ratings

- O Outstanding
- E Excellent
- A Acceptable
- M Marginal
- U Unacceptable

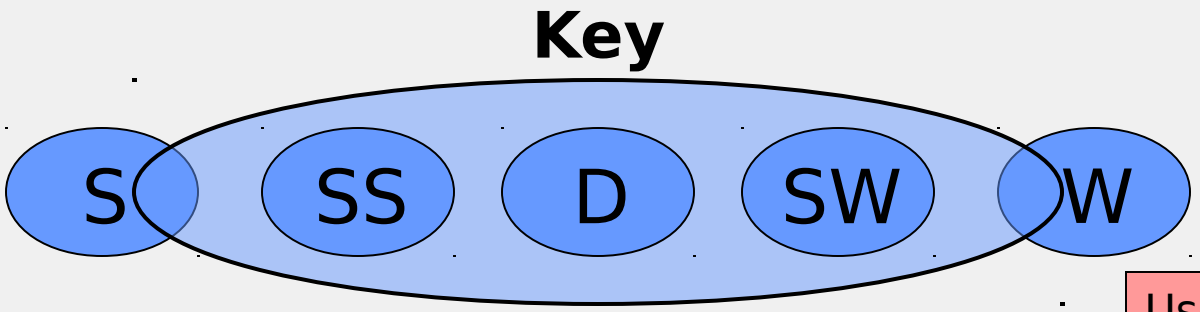
Confidence Ratings

- H High Confidence
- S Significant Confidenc
- C Confidence
- ? Unknown Confidence
- L Little Confidence
- N No Confidence

Source Selection Information See FAR 2.101 & 3.104

Briefing Chart Conventions

"Key" - includes all deficiencies, significant strengths & significant weaknesses as well as any strengths and/or weaknesses that have an impact on the rating assigned.



Use this chart only if you are briefing "Key" S&Ws vice ALL S&Ws

++	Indicates a Significant Streng
+	Indicates a Strength considered Key
-	Indicates a Weakness considered Key
--	Indicates a Significant Weakness

Source Selection Information See FAR 2.101 & 3.104

{Subfactor Title}

Offeror A

Create similar slides for all offerors
And for all factors/ sub-factors with
Assigned ratings.

C

Summary of Strengths - (x SS, x Use only if Key strengths are shown=>, **x** S total)

++ Insert all significant strengths
+ Insert any strengths considered “Key”
If no “Key” strengths, so state – “No key strengths noted”
Show count of strengths & significant strengths briefed and count of all strengths & significant strengths

Use only if Key weaknesses are shown

Summary of Weaknesses - (x SW, x W)

(**x** SW, **x** W total)

-- Insert all significant weaknesses
-Insert any weaknesses considered “Key”
If no “Key” weaknesses, so state – “No key weaknesses noted”
Show count of weaknesses & significant weaknesses briefed and count of all weaknesses & significant weaknesses

Deficiencies

(0 total)

• Insert all deficiencies. If none so state – “No deficiencies noted”

Confidence Rationale

Provide the rationale for the rating assigned**.**

Source Selection Information See FAR 2.101 & 3.104

{Subfactor Title}

Offeror B

Create similar slides for all offerors And for all factors/ sub-factors with Assigned ratings.

C

Summary of Strengths - (x SS, x Use only if Key strengths are shown=>, **x** S total)

++ Insert all significant strengths
+ Insert any strengths considered “Key”
If no “Key” strengths, so state – “No key strengths noted”
Show count of strengths & significant strengths briefed and count of all strengths & significant strengths

Use only if Key weaknesses are shown

Summary of Weaknesses - (x SW, x W) (**x** SW, **x** W total)

-- Insert all significant weaknesses
-Insert any weaknesses considered “Key”
If no “Key” weaknesses, so state – “No key weaknesses noted”
Show count of weaknesses & significant weaknesses briefed and count of all weaknesses & significant weaknesses

Deficiencies (0 total)

• Insert all deficiencies. If none so state – “No deficiencies noted”

Confidence Rationale

Provide the rationale for the rating assigned**.**

Source Selection Information See FAR 2.101 & 3.104

{Subfactor Title}

Offeror C

Create similar slides for all offerors And for all factors/ sub-factors with Assigned ratings.

C

Summary of Strengths - (x SS, x Use only if Key strengths are shown=>, **x** S total)

++ Insert all significant strengths
+ Insert any strengths considered “Key”
If no “Key” strengths, so state – “No key strengths noted”
Show count of strengths & significant strengths briefed and count of all strengths & significant strengths

Use only if Key weaknesses are shown

Summary of Weaknesses - (x SW, x W) (**x** SW, **x** W total)

-- Insert all significant weaknesses
-Insert any weaknesses considered “Key”
If no “Key” weaknesses, so state – “No key weaknesses noted”
Show count of weaknesses & significant weaknesses briefed and count of all weaknesses & significant weaknesses

Deficiencies (0 total)

• Insert all deficiencies. If none so state – “No deficiencies noted”

Confidence Rationale

Provide the rationale for the rating assigned**.**

Source Selection Information See FAR 2.101 & 3.104

Evaluation Summary

Duplicate the slide shown earlier to re-cap the rating discussed in the preceding slides.

Source Selection Information See FAR 2.101 & 3.104

Do not show these slides to the SSA until a decision has been reached.

Backup Slides

Offerors

- A- Offeror Name
  - Team members
- B- Offeror Name
  - Team members
- C- Offeror Name
  - Team members
- D- Offeror Name
  - Team members
- E- Offeror Name
  - Team members
- F- Offeror Name
  - Team members

Source Selection Information See FAR 2.101 & 3.104

Evaluation Summary

	Name Offeror A	Name Offeror B	Name Offeror C	Name Offeror D	Name Offeror E	Name Offeror F
Factor 1 Past Performance	C	C	C	C	C	C
Factor 2 anagement Approach						
SF1 {Insert sub-factor Name}	C	C	C	C	C	C
SF2 {Insert sub-factor Name}	C	C	C	C	C	C
SF3 {Insert sub-factor Name}	C	C	C	C	C	C

Duplicate the summary slide, but show the Offeror's name along with the letter identifier.

Confidence Ratings

H	High Confidence
S	Significant Confidence
C	Confidence
?	Unknown Confidence
L	Little Confidence
N	No Confidence

Factor 1> Factor 2
Factor 2: SF1=SF2=SF3

Source Selection Information See FAR 2.101 & 3.104